wealthcraft

WealthCraft

Importing Leads Process Guide

April 2016

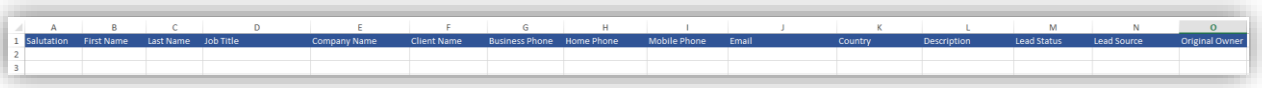
Contents

Part 1 – Populating the Lead Information

Firstly, you will need to download the **Lead Import Template** from the WealthCraft Support Material page which can be accessed via your adviser landing page or by clicking on the following link:

WealthCraft Support Material

After you have downloaded the XLS Spreadsheet, the following document will be displayed:



Salutation	First Name	Last Name	Job Title	Company Name	Client Name	Business Phone	Home Phone	Mobile Phone	Email	Country	Description	Lead Status	Lead Source	Original Owner

Enter all the information you know about the lead in the relevant fields. Below is the minimum fields that will need to be populated in order for the import to be successful:

- **First Name**
- **Last Name**
- **Contact Number (i.e. Business/Home Phone)**
- **Owner**

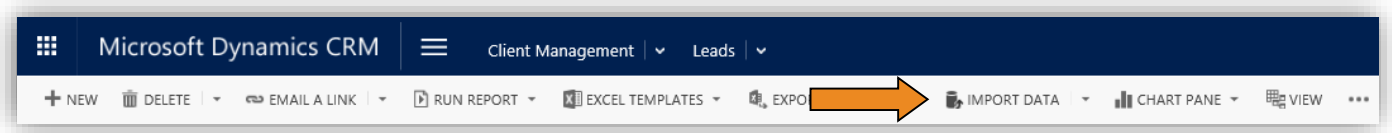
Once you have finished entering all the required information, save the document as a 'XML Spreadsheet 2003'. You are then ready to import the leads into the system.

Part 2 – Importing Leads

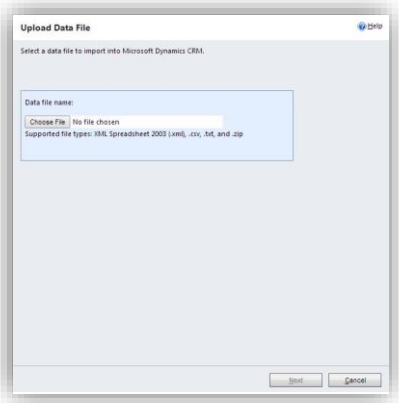
In order to successfully import leads into WealthCraft, follow the below steps.

From any screen in the system select **Microsoft Dynamics CRM > Client Management > Leads.**

Now select **Import Data.**

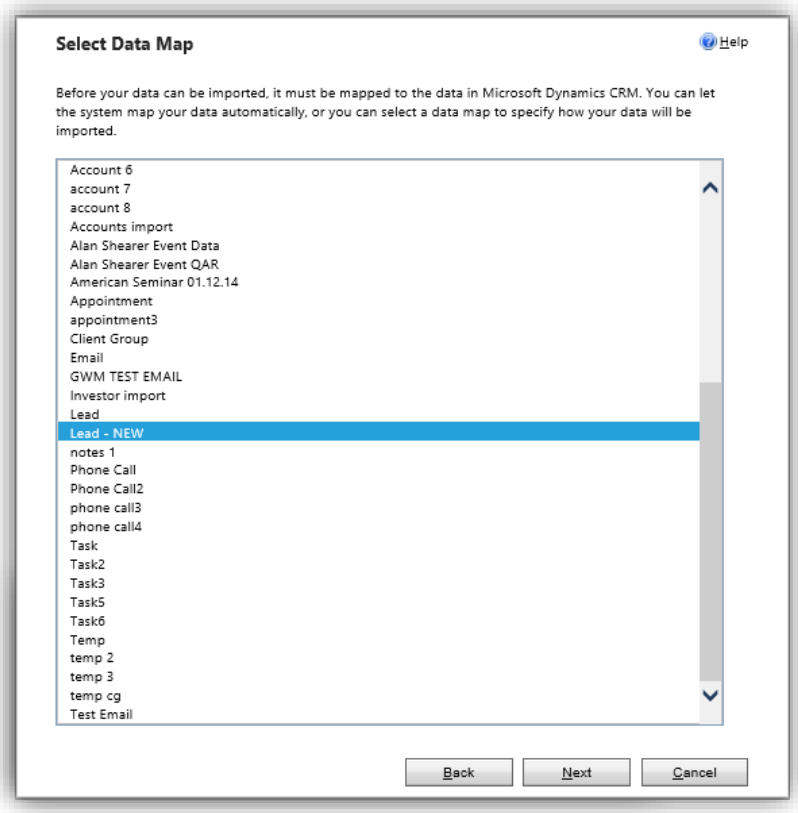


A new window will appear allowing you to choose a file to upload. Select the XML Spreadsheet 2003 file that you created in Part 1 and click **Next**.

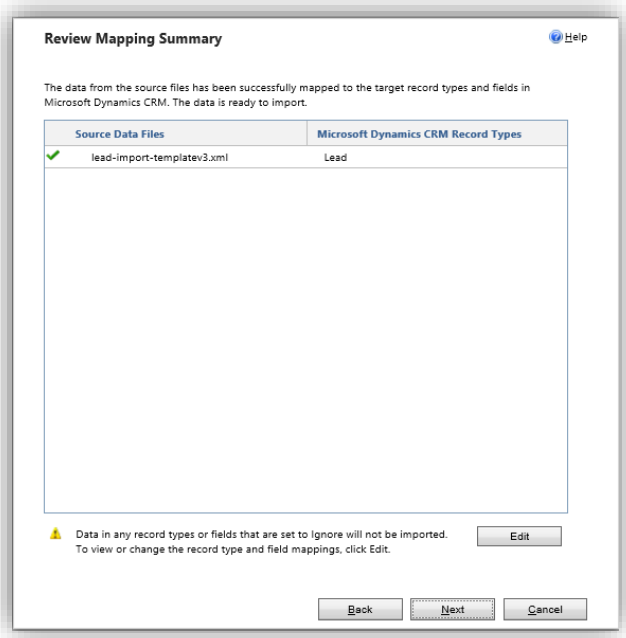


A new screen will appear reviewing the files you are trying to upload. If you are happy with the summary of files, click **Next**.

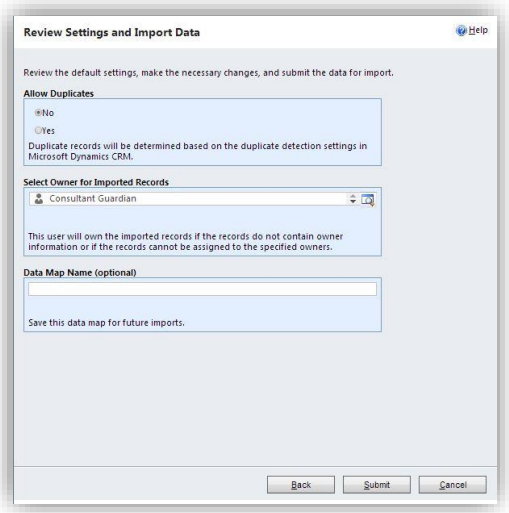
You will then be asked to ensure that all the data is being mapped to the correct formatting for WealthCraft. To do this, select **Lead – NEW** underneath the **Customized Data Maps** heading and click **Next**.



You will then see the Review Mapping Summary screen – click **Next**.

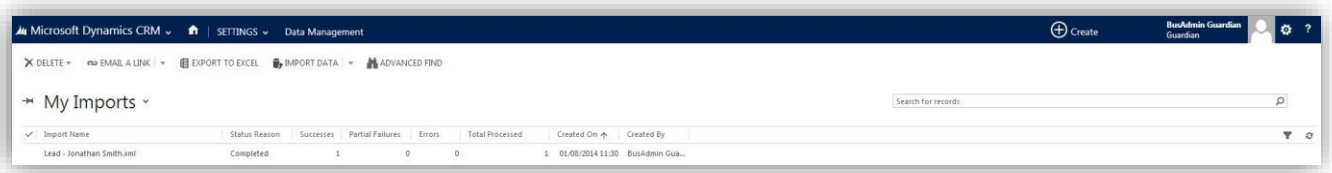


In the Review Settings and Import Data page, ensure that No is selected in the Allow Duplicates section. Click **Submit**, then click **Finish**.

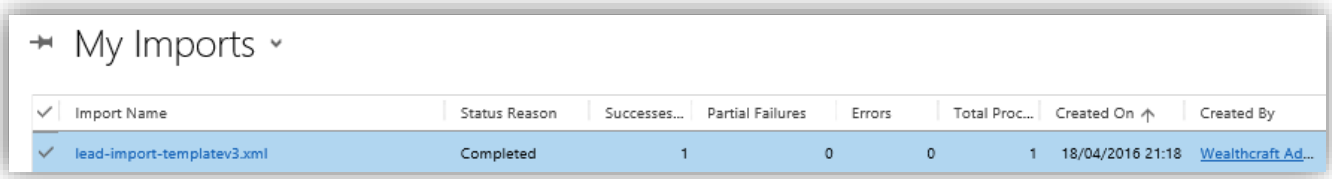


Part 3 – Reviewing the imported records

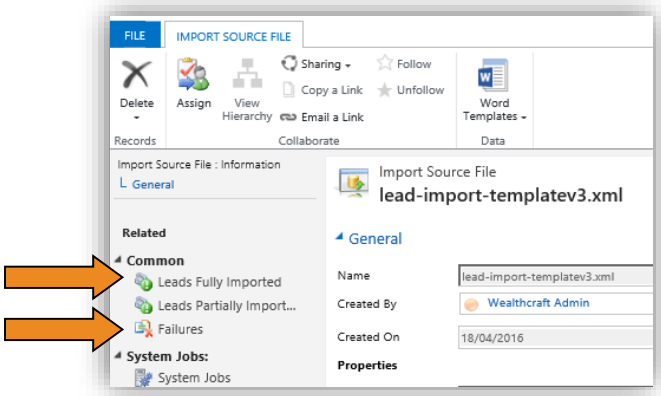
You can review the records that were imported by going to **Microsoft Dynamics CRM > Settings > Data Management > Imports.**



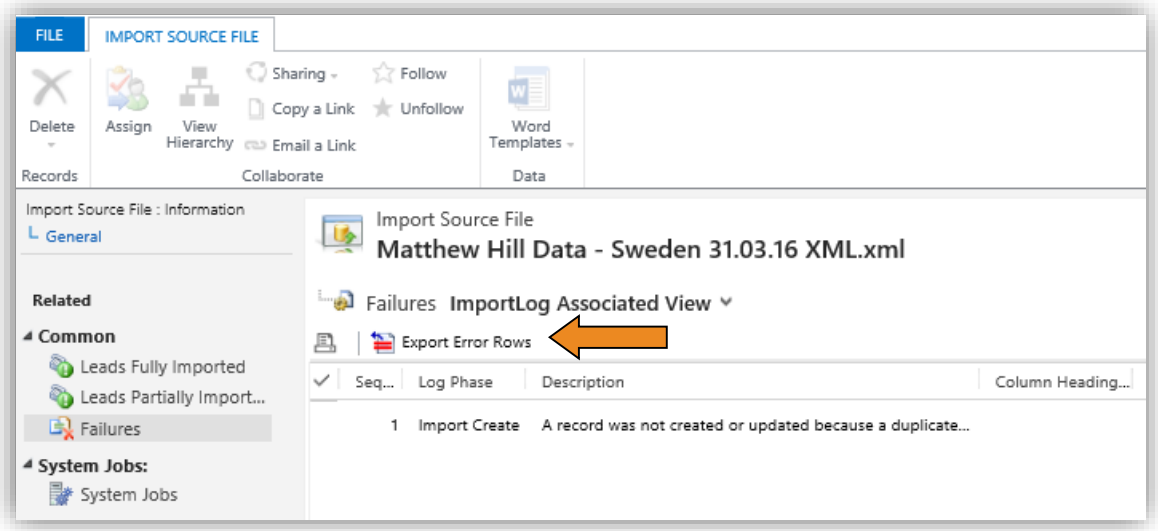
Locate the import you wish to review and then click on the import name to open it.



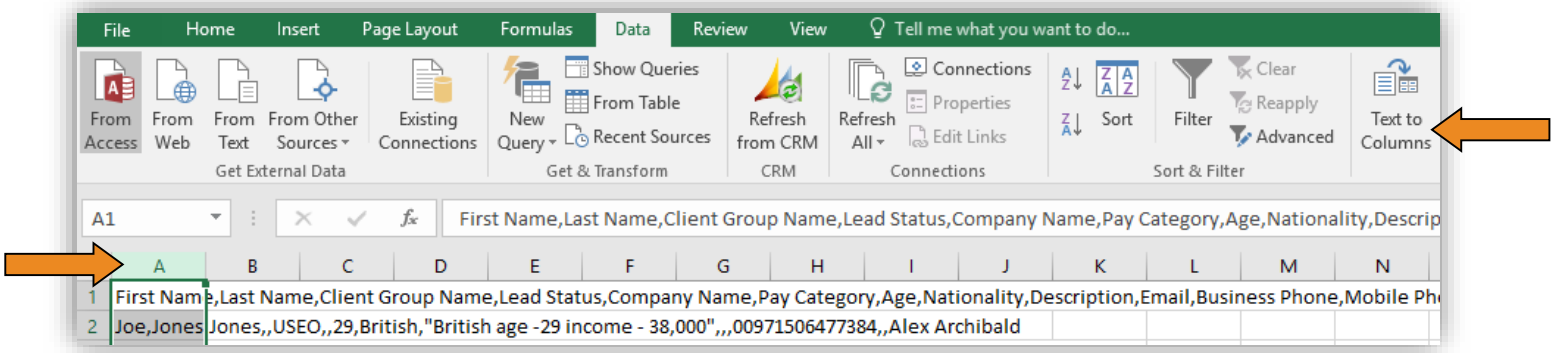
You can drill down to see those leads that were fully imported or failed by clicking on the relevant section.



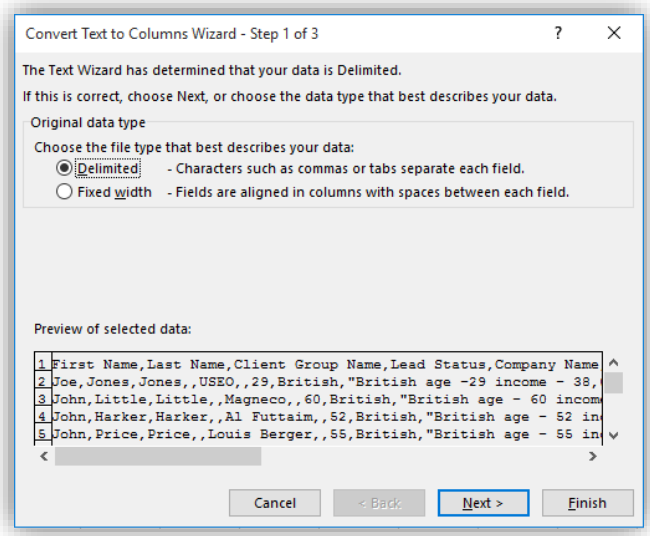
To extract the failed records click on **Failures**. Now click on **Export Error Rows.**



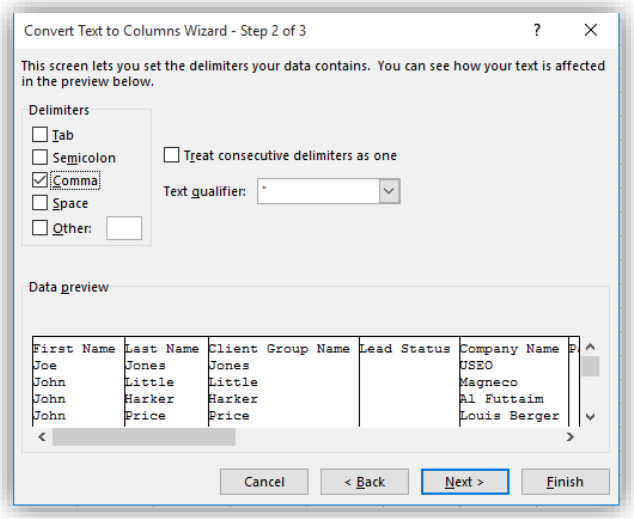
A spreadsheet will open and require some minor formatting. Highlight column A then select **Data**, then **Text to Columns**



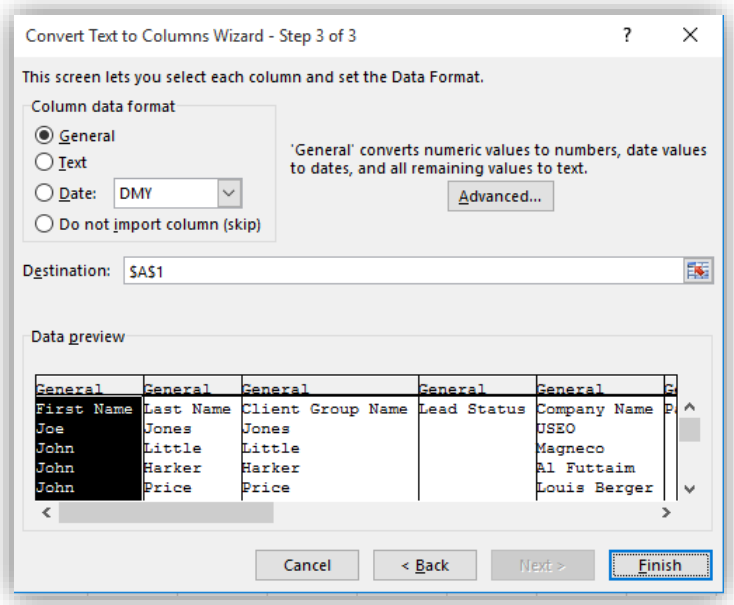
Choose **Delimited**, then Next



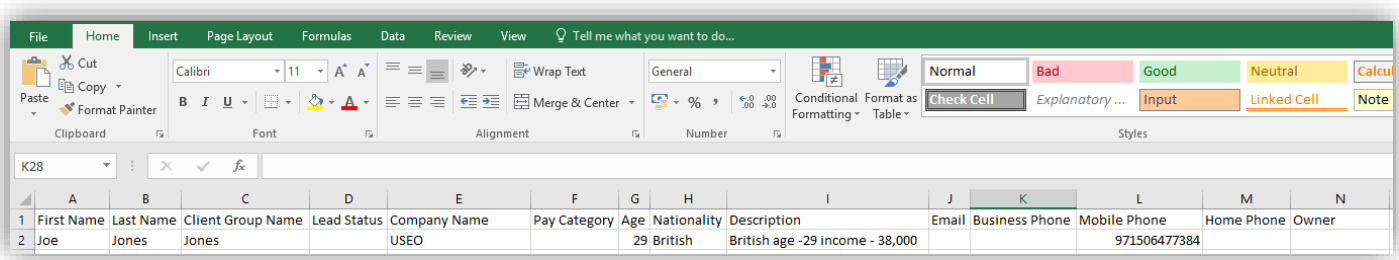
Ensure only **Comma** is selected.



The next screen should appear as so by default. If not, then amend accordingly and click **Finish**.



You will now have a formatted spreadsheet that can be sent to the person requesting the upload.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	First Name	Last Name	Client Group Name	Lead Status	Company Name	Pay Category	Age	Nationality	Description	Email	Business Phone	Mobile Phone	Home Phone	Owner
2	Joe	Jones	Jones		USEO		29	British	British age -29 income - 38,000			971506477384		

The user can then create these leads manually at which point WealthCraft will identify the duplicate. If the existing Lead record is owned by the relevant lead pool the user can reassign it to themselves so they can proceed.